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SFX Label & Options Menu - Formal User

Test of SFX Menu: Current

Bledsoe, Cora; McCarley, Tonya

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Project Cover Sheet

Project	SFX Label & Options Menu <i>Formal User Test of SFX Menu: Current</i> SFX is a tool provided by the University Library that creates shortcuts to the full-text of online articles, as well as links to other Library services. When searching in many of the University Library databases, there will be an SFX button or link that connects to a menu of options.
Committee & Members	Usability Working Group Kat Hagedorn (chair), Suzanne Chapman, Karen Downing, Anne Karle-Zenith, Shana Kimball, Jennifer Nardine, Gurpreet Rana, Robert Tolliver Cora Bledsoe (student intern), Tonya McCarley (student intern)
Report Info	Report Author(s): Cora Bledsoe, Tonya McCarley Contact Information: ul-usability@umich.edu Report Date: December 2006; Last Revised: December 2006 Date Submitted to PARC: not submitted
Objectives	It is well understood that the label of the SFX Options Menu page is unclear and confusing to the user. Our goal was to observe how users navigated the menu.
Methodology	Method – Formal Usability Test 11 participants Dates of study: November 2006
Results & Analysis	Results were conclusive. Users selected either the SFX button or the article title to begin the process of retrieving an online article. Choice of navigation within the menu depended on whether full text was obviously available or not.

Recommendations

- Users often click on the title instead of the SFX button. Two possible reasons: they don't know what SFX means and/or they are used to clicking on titles as they would in Google.
- Users would like the option to save their citation, but need more complete Source information at the top of the SFX menu.
- The Mirlyn link is often used when there is no obvious full text available.
- A couple users expressed concerns about citing electronic sources—this is frowned upon by professors since all electronic sources are thought of as web resources, not primary source material. Some explanation/assistance about this would be helpful linked from the SFX menu.
- The Document Delivery section needs to have the options more fully explained, especially the associated fees. Users are under the impression that most of these options cost.

Introduction

A formal usability test was conducted during the week of November 11-17, 2006 on the SFX Options Menu. The goal of the testing was to assess the functionalities of the current SFX Options Menu based on users' completion of four tasks.

Methodology

The tasks were created to observe the ability of users to obtain an online article from the SFX Options Menu. The Usability Working Group (UWG) reviewed several drafts of the script, which included the four tasks. In the weeks prior to the test, users were recruited through a news announcement placed on the University of Michigan Library home page, a direct email campaign targeting student groups, and contact through the various reference desks. An incentive of a \$15 gift certificate to Amazon.com was offered to the participants. Twelve users were successfully recruited to participate. Eleven users completed the test.

The Graduate Student Study Room (4th floor, Shapiro Library) served as the location for the test. The test was conducted on the UWG's Gateway laptop computer. There was an external microphone attached to the computer. No external mouse was provided; participants used the touchpad on the laptop to navigate. Camtasia software was used to record two actions: the voice of the participant as they spoke out loud and their actions on the laptop.

At the beginning of each session, participants were asked to complete a pre-questionnaire. After completing the tasks, the participants were then asked to complete a post-questionnaire. See *Appendices A, B, and C*.

Results

Pre-Questionnaire Results

Seven out of 11 participants were graduate students, 2 were faculty, and 2 were undergraduate students. Participants were asked to rate their prior SFX experience on a scale of 1-5, with 1 as novice and 5 as expert. One user rated herself as an expert SFX user; the average self-rating for the group was 2.4 with one "I don't know" response. The Pre-Questionnaire revealed the following trends:

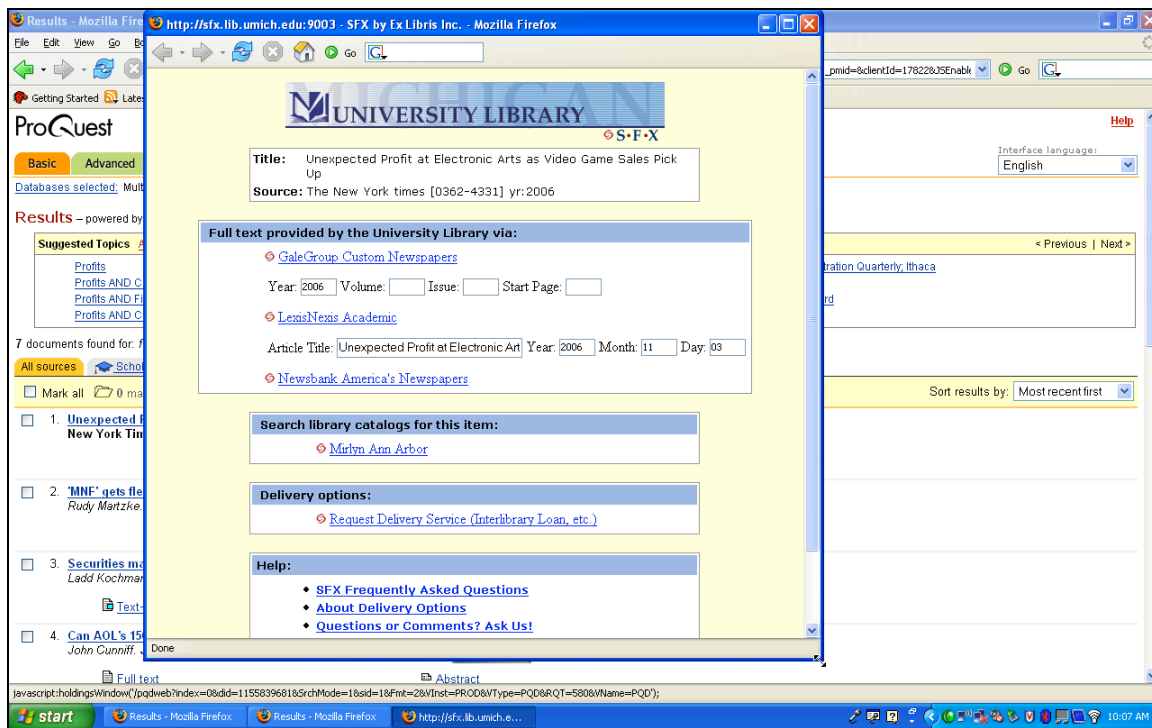
7 out of 11 participants use Google daily
7 out of 11 worked with a Librarian once or twice a semester
8 out of 11 participants used Mirlyn weekly, if not daily
7 out of 11 participants used Search Tools weekly, if not daily
6 out of 11 participants have never used Ask Us Now
0 out of 11 participants had instruction from the library

Task 1

In the first task, participants were asked to retrieve an online article from the first result on a Proquest results page. Seven out of 11 participants clicked on the article title to start the retrieval process; the remaining 4 clicked on the SFX button first. The users who selected the title were then required to navigate to an additional page from which they clicked on the SFX button. Two users who clicked the title first picked the SFX button on the second page because of the text, ‘availability at UM’, located near the button; one user commented she selected the SFX button at this point because it said “availability at U Michigan.”

When the SFX Options Menu window is opened, it is often too small to display all of the results. It was observed that 4 out of 11 participants resized the window immediately so they could see more of the results.

From the SFX Options Menu, users were able to decide upon a database to locate the article. Six out of 11 users selected Lexis-Nexis, although it was listed second after a Gale Group option. One faculty member expressed her frustration with Lexis-Nexis even after she selected it as her first choice because she has to reenter all of the information from her original search result. Additionally, a graduate student was frustrated when she “thought it would go to an article and it takes me to another search window.”



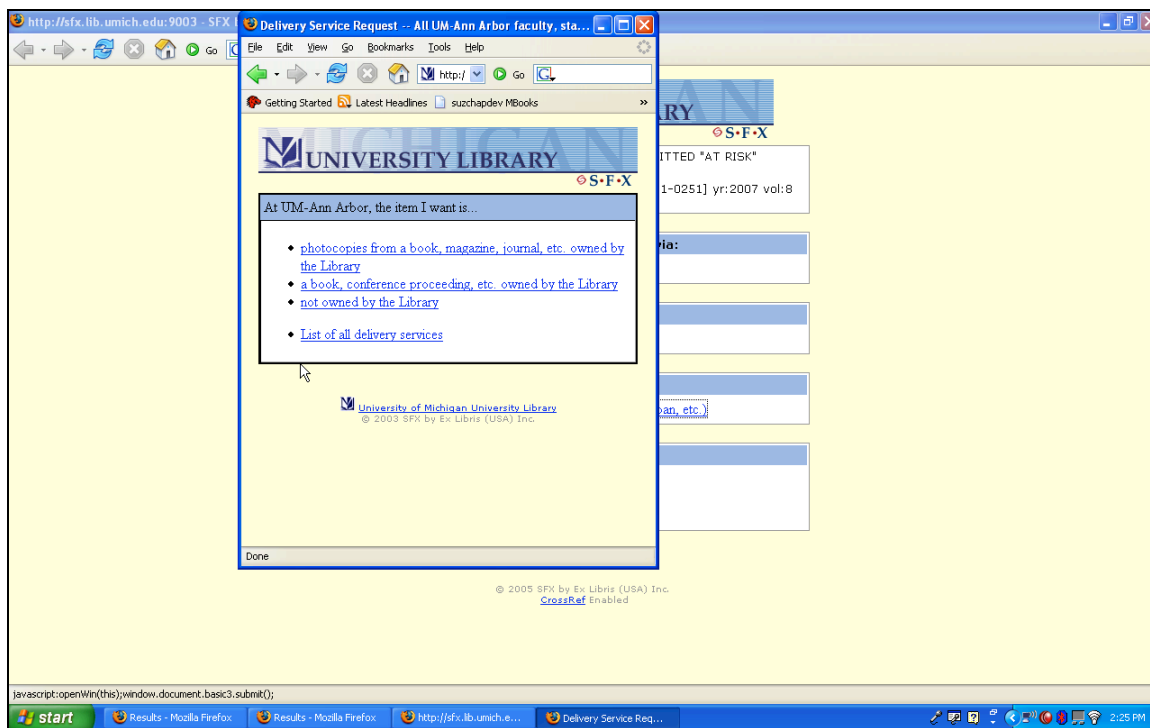
Task 2

The second task was designed to test the Mirlyn feature by asking users to search for an online resource that was not currently available electronically. To begin, the user was asked to click on the SFX button associated with a specific Proquest result. Once at the SFX Options Menu, the user was asked to take the steps to retrieve the article. When the article could not be retrieved electronically, the users were asked what they would do next from the SFX Options Menu. Nine

out of 11 users went directly to the Mirlyn link. One user stated she would choose Mirlyn because “it was the next option.” One faculty member who did not select Mirlyn stated he would select the document delivery service option to start the process to have it delivered it to him.

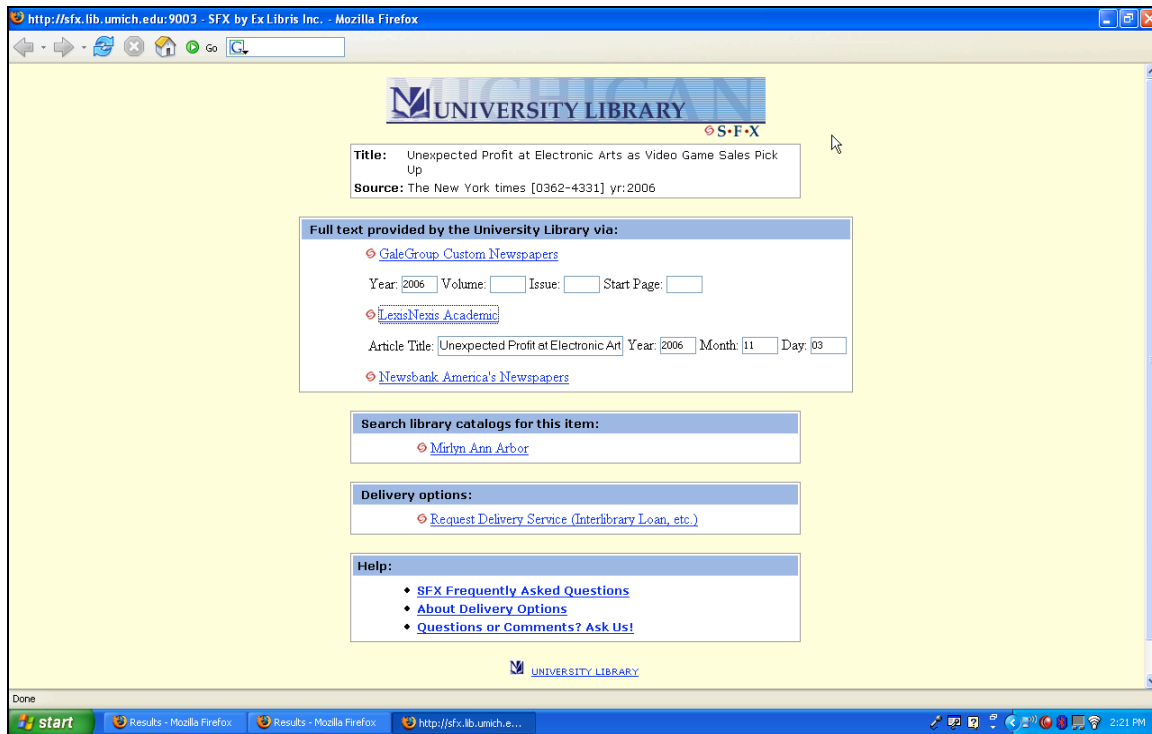
Task 3

The third task was designed to continue locating the article from Task 2 by asking users what their next steps would be from the SFX Options Menu. The purpose of this task was to determine their understanding of the document delivery options. All 11 participants thought they should try the Document Delivery option to obtain the article, although there was some uncertainty. Once users reached the screen that asked about the format of the materials they wanted to receive, they hesitated and were unsure. Two graduate students thought there might be a cost associated with the service. One graduate student was concerned that this service is only available to staff; three graduate students felt this service was only for Inter-Library Loan and books, not electronic copies; and two students (one graduate and the other graduate) were uncertain if the University owned the materials. One graduate expressed concern regarding his status; as a graduate student instructor, he was both a student and a staff member. Three participants stated that rather than go through the document delivery options, they would rather physically go to the Library to retrieve the materials.



Task 4

Task four was designed around the information provided in the Source box at the top of every SFX Options Menu. Specifically, did the Source provide enough information for a citation and if not, what was missing? Seven out of 11 users stated they would like to see author information, especially if they can save it as a citation. Two out of 11 users would like to see the Mirlyn call number. Four out of 11 users stated they would like the page range as well; especially to “put it in End Note or ProCite” according to one user.



Post-Test Questionnaire (the majority of which were fill in the blank)

What is your overall impression of the system after doing this test?

- The system seems nice-it would probably be helpful to explicitly state some of the guides for simple tasks (maybe some onscreen directions to help users get to an article)
- It seems like it does a pretty good job at organizing lots of information. It does seem that it takes one or two more steps than necessary to accomplish certain tasks.
- I have a better idea of what SFX is, and I will now click on the "box" instead of the article titled link to retrieve the articles I want.

What aspects of the system did you find particularly difficult to use?

- It is a little hard to navigate in terms of getting an article. The links are clear, but it's not always completely obvious that the link will lead you to the article.
- I didn't know what SFX was at first or to click on that box instead of the article link.
- It is a little bit confusing if the article isn't available via the web. It took me a few trials before I realized I needed to look at Mirlyn before the ILL.

What types of features would you want to find in the SFX window?

- A "save reference" option would be nice. I am used to PubMed, so an option to just download a PDF for example (when available) would be nice.
- An obvious link to the full text. Something that says "full text link" or something like that in the list of articles the search generates.

- Direct link to a full text of an article (perhaps using the DOI in some way?); ability to save citations in my choice of style in RefWorks, EndNote or pasteable text. (see the quick bib feature in the LISA database).
- Maybe. The easiest ways to find the materials? For instance...if the article isn't online if the SFX said "The next easiest step..."

Do you have any suggestions to improve the system with regard to interface, such as icons, navigation, labels, display, and help info?

- Just the same suggestions mentioned above; more guides, such as "To obtain a full article, follow one of the following links" etc...
- When the SFX window first opens, it's pretty small, and I usually want to enlarge it. I'd like it if the window were larger.
- The SFX icon should say "for full text click here" etc.
- I would somehow make it more obvious to click on the SFX link to retrieve articles (in full text).

Recommendations

This test confirmed the results of the SFX Label Test that was previously conducted. One major finding is that users often click on the title of the article rather than the SFX button because they don't know what SFX means. This takes the user through at least one more step before finally clicking on the SFX button. If the SFX label were changed to better reflect the user's mental model on the search results page, unnecessary steps could be eliminated and reduced frustration would result.

Users would like the option to 'save the citation', but they would need to be given complete information. The source given at the top of the SFX Options Menu could serve this purpose, however key information is missing. At a minimum, the author, page range and electronic source should be listed in addition to the information that is currently present. In addition, some users are unclear about saving the citation of electronic sources. Many avoid using the SFX resources, because they are unsure as to whether they are allowed or whether it is acceptable to use online resources. Five out of 11 users would prefer to treat the online resources as a paper citation. One user stated that if there is a stable URL they would use that, otherwise they would treat it as if it were taken directly off the shelf.

In the Document Delivery section, the options should be clearly explained, along with associated fees. Users would like to know what their options and costs would be before going through the process.

Appendix A: Pre-test Questionnaire

1. What is your role at the University?

- ☐ Undergraduate student
☐ Graduate student
☐ Faculty
☐ Staff

2. On a scale of 1-5, with 1 being complete novice and 5 being expert, how would you rate your prior experience with SFX?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

3. How often have you used each of the following?

	Never	Rarely	Sometimes	Regularly	Frequently
Mirlyn					
UM Search Tools					
Yahoo!					
Google Scholar					
Proquest					
Others (Please list if any)					

4. What options would you like to see on the SFX SFX window that would be useful to you on a regular basis?

Appendix B: Test Script

Hi. Thanks for coming today and agreeing to take part in this. My name's _____ and this is _____. Please have a seat. **[Take seats]** We're working for the University of Michigan Library's Usability Working Group.

SFX is a tool provided by the University Library that provides links to the full-text of online articles, as well as links to other Library services. When searching in many of the University Library databases, you will see an SFX button or link that connects you to the SFX window.

We've been asked to identify issues with the SFX window, which is where you come in. To get user feedback on this page, we're going to ask you to complete a few simple tasks while we record how you perform those tasks using Camtasia software. Then we'll ask for your opinions of SFX. I'll be facilitating the test and _____ will be observing and taking notes.

Before we start the test, there's some paperwork I'm going to ask you to fill out. **[Hand subject 2 copies of consent form]** The first is a consent form and when we submit our report, all identifying information will be removed. We have 2 copies of the form here—one for you to keep and one for our records. I'll give you some time to read that and sign it. If you have any questions, please let me know. **[Take signed copy]**

Thanks. **[Hand subject pre-test questionnaire]** Now I have a short questionnaire that I'd like you to fill out. Basically, it's for us to get some demographic information and find out about your experience using various on line research tools. **[Take completed questionnaire]**

Now that we've gotten the paperwork out of the way, do you have any questions before I explain how this is going to work? **[Pause for questions]**

As you've probably already noticed, I'm going to be reading from my script because there are a lot of things I need to cover, and I want to get everything exactly right. This test session will probably last approximately 45 minutes. It will consist of several tasks. I'll ask you to complete using the SFX window. _____ will be taking notes on the process you use to complete the tasks.

One point that I can't emphasize enough is that we're testing SFX—not you. We're trying to make it easier to use; so any problems you tell us about will help us improve the service. Your comments are very valuable. If you run into some difficulties or are uncertain about some choices, please try to work through the problems as best you can. If you have questions feel free to ask. We may or many not be able to answer as we are trying to simulate a real world situation.

Finally, please think out loud while you're doing the tasks. Basically, we want to know what you think of the system while you're using it. So please say what you're doing, why you decided to make a particular choice, what you think of the interface, things like that. We're not stakeholders of this product so feel free to be completely candid.

Do you have any questions before we begin? **[Pause for questions]** Okay, then, let's get started. Please let us know if you need more explanation.

... (after post-test questionnaire) That's great! Thanks again for participating in our study. As a token of appreciation we'd like to offer you a gift certificate to Amazon.com.

Appendix C: Post-test Questionnaire

Thank you again for taking the time to help us with our evaluation. Before we let you go, we'd like to ask you a few brief questions about the tasks you've just completed.

What is your overall impression of the system after doing this test?

What aspects of the system did you find particularly easy to use?

What aspects of the system did you find particularly difficult to use?

What type of features would you want to find in the SFX option menu?

Please rate the following statements on a scale from Strongly disagree to Strongly agree

The interface—which includes the menus, organization, and overall look—was designed well to help me perform the tasks.

☐ Strongly disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

It was easy to understand what the various labels meant.

☐ Strongly disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

I am likely to use the SFX option menu in the future.

☐ Strongly disagree ☐ Disagree ☐ Neutral ☐ Agree ☐ Strongly Agree

Do you have any suggestion to improve the system with regard to interface, such as icons, navigation, labels, display, and help info?

Are there any other comments you want to add?